FMS 940 How to Review and Schedule a Maintenance Project

This Training Guide will demonstrate how to review and schedule a maintenance project.

Before you begin . . .

Upon completion of this guide you will be able to:

- Sign in to FAMIS
- Recognize FAMIS navigational elements
- Review a maintenance project
- Schedule work orders on projects

Who has access?

All FM Supervisors and Project Managers. Staff must have the appropriate security access to the FAMIS application.

What does it affect?

Review maintenance projects.

How to log in?

Contact the Help Desk for security access to FAMIS.

Additional Resources

http://cafe.northwestern.edu/training/

Where to get help? For assistance, contact NUIT Support Center at 847-491-HELP (4357), or email consultant@northwestern.edu
Getting Started: Opening a Maintenance Project

Nice To Know Tip: Double clicking on a project row will display the Project. Selecting View Plan will display Project Plan with phases.
Step 3a: Creating Phases in a Project

To create a Phase for project, create a service request in FAMIS Self Service and inform Customer Service to convert the Service Request into a Phase. Include all necessary information about the Phase in the Service Request. Customer Service will need to know the SR# and PR#. Customer Service is responsible for the billing for all phases of a project.
Step 3c: Scheduling Approved Phases in a Project

Phases can be scheduled immediately as a Work Order by setting a status of SCHEDULED. Phases can be set with a status of APPROVED and converted into a Work Order at a later date in sequencing a project.
Step 5a: Closing a Maintenance Project

First, when work orders are completed for a Project, they should be marked closed; this can be done in multiple places in FAMIS. To do this from the Project Workbench, select the Project row and click Work Orders button at the bottom, double click on each work order and change status to closed.

Second, open a Phase in a Project to change its status.

To Open Phase Summary in Project:
1. Locate Project Number.
2. Click in any field.
3. Click View Plan button.
4. Click Phase button.

Note: Work order status and Phase status are independent of each other and must each be updated. All Work Orders and Phases must be closed before the Project can be closed.
**Step 5b: Closing a Maintenance Project**

In Project Plan form, Change Status to **Closed**.

1. Change Status to **Closed**
2. Click **Save**
3. Click to close

*Note: If a project needs to be placed on hold for any reason, keep status as **Open** to keep charges from being processed.*

*Note: The Project Workbench will not display CLOSED status until the form is refreshed.*